

How To Conduct A Community Visioning Process

Community visioning can be organized in many different ways utilizing a variety of public participation techniques. However, creating a common vision requires several actions to complete the process. While there are no hard and fast “rules” for this process, each community will need to find its own pace, participants, and techniques that work best. What this guide offers is an example process and a variety of tools that have been used effectively in other communities just like yours.

Here is one example of how community visioning can be accomplished over the course of several working sessions. It is based upon The Center for Rural Pennsylvania’s *Planning for the Future: A Handbook on Community Visioning*. This example is neither magical nor absolute and it can be modified to meet your own community’s needs. **REMEMBER:** It is always advisable to provide refreshments at your community workshops and to videotape all your working sessions.

The three basic elements of the process:

- **Establish a Steering Committee.** This committee should be responsible for oversight and organization of the entire process.
- **Community Workshops.** Open public meetings that are used to inform citizens about the visioning process, to discuss the progress being made and to discuss issues affecting the community.
- **Taskforces.** Small groups that gather information on a specific issue affecting the community and identify possible solutions.

Each of these elements are included in the following example. The timeframe in developing a vision statement can range from 6 to 12 months depending on the level of commitment of the participants. In general, your community visioning process should proceed as follows:

1. **Getting Started:** Steering Committee forms and begins planning for the first workshop.
2. **First Community Workshop:** Steering Committee provides an overview of the visioning process and asks participants to identify issues affecting their community.
3. **Establishing Taskforces:** Steering Committee tallies results, develops list of taskforces, and plans for second workshop.
4. **Second Community Workshop:** Steering Committee reviews activities to date and breaks participants into small taskforces, giving each a specific issue to examine in detail.
5. **Keeping on Track:** Steering Committee ensures that taskforces are meeting regularly and plans for the third workshop.
6. **Third Community Workshop:** Taskforces report major findings to the community. Participants are asked to discuss what they want their community to look like in the future.

7. **Drafting the Visioning Statement:** Steering Committee ensures that task forces are meeting regularly and drafts a tentative vision statement.
8. **Fourth Community Workshop/Celebration:** Public unveiling of vision statement and celebration of the community and its residents.
9. **Marketing and Making the Vision a Reality:** Steering Committee and taskforces present the vision statement to community groups, local governments, and other organizations for their formal approval of the statement. Committee and taskforces request these groups to use the statement when making decisions affecting the community.
10. **Action Plan:** Working with various community organizations and governments, the Steering Committee develops an action plan by implementing the taskforces' recommendations and other elements of the vision statement.
11. **Annual Progress Report:** The Steering Committee plans a meeting that reviews the activities and accomplishments to date and what activities will be implemented the following year.

Keep in mind in community visioning there is no absolute formula where step one will automatically lead to steps two, three and four. The steps outlined here have worked in many communities, but not all, so you should feel free to combine, rearrange, or even eliminate steps as needed to expedite the process. The final measure of your vision's success is not how closely you follow this example, but how effective you are in improving your community's quality of life.

GETTING STARTED

In all communities, there are people and organizations that are respected and active. Business owners, elected officials, members of non-profit agencies, educators, health care professionals and others who are actively interested in improving their community should be members of your Steering Committee. Key points to remember in forming a Steering Committee include:

- Open membership up to many organizations;
- Reach out across the community: public, private, and nonprofit;
- Be inclusive, not exclusive;
- Don't avoid differences in opinion; and
- Don't get stuck on the past. Remember this a plan for the future.

Once the list of likely members has been put together, invite them to a meeting. Don't be disappointed if only a few show up. It takes momentum to get going, but once it starts, it is contagious.

At the first meeting, and at others if necessary, do the following:

1. **Identify who is missing from the group.** Make a concerted effort to identify persons and/or organizations that should be involved. At this point, the list should

- include those who are considered influential in shaping community opinions. These individuals should be invited to the next Steering Committee meeting.
2. Select a Chair or Co-Chair of the Steering Committee. The Chair's job is to keep the process focused and to give every participant the chance to have a say in the process.
 3. **Establish a positive attitude.** Initiate a brief discussion on the community's strengths to help get a positive tone going.
 4. **Develop an action plan.** This plan does not need to be very detailed, but it should include the next step in the process, when the public should be involved, what resources are available to see the process through, and who will be available to provide guidance and technical support.
 5. **Develop a working definition of your community.** Meeting participants should leave with an understanding of the geographic boundaries of the community and an understanding of the economic, cultural and social bonds that make them a community.

REMEMBER: It is a good idea to ask other organizations or agencies for assistance and technical support. In addition, it is a good idea to seek contributions and donations to help provide for the food at the workshops.

KEY OUTCOMES:

- Form a functional Steering Committee made up of 10 to 20 members who represent a cross section of the community.
- Time: One to two months
- Cost: None

FIRST COMMUNITY WORKSHOP

At the first community workshop, the Steering Committee needs to be concerned about two things: organization and outcome. The organization is how the workshop is put together. The outcome is what information is generated during the workshop. Both of these elements are critical for a successful workshop.

Organization:

Organizing a community workshop is not difficult, but it can be challenging. The Steering Committee however needs to be in charge of this process. Below are some of the basic items that should be considered.

1. **Location:** The first step is to select a location. As a general rule, you should choose a facility that people are familiar with and comfortable visiting. There must be good access and available parking.
2. **Date:** Selecting a date can be a tricky matter. Weekday morning workshops can be just as popular as evening workshops. Similarly, Saturday morning can also be very popular. There are two general rules to follow when selecting a workshop

- date: first, make sure on other community group has an event scheduled at the same time; second, give the Steering Committee plenty of lead time to adequately promote and organize the workshop.
3. **Agenda:** Developing and following an agenda is essential. An agenda lets participants know what is going on and how long the workshop will last. Some key items to include in the agenda are: (1) welcoming remarks and the purpose of the workshop (Why are we here and what do we want to accomplish?); (2) a large block of time for small group discussions; and (3) concluding remarks and a discussion of the next step (Where do we go from here?).
 4. **Speakers:** When selecting speakers, it is important to choose people who have effective communication skills and who are comfortable speaking in front of large groups. The welcoming speaker should be from the Steering Committee. The person giving the overview of the visioning process can also be a Steering Committee member, or someone from outside the community (such as a government agency, consultant, etc.). Pre-select and train a small group of facilitators for the workshop. Your facilitators can be members of the Steering Committee or local resource people, like your planner, RC&D coordinator, or county extension agent.
 5. **Promotion:** To ensure good attendance, promote the workshop throughout the community. You may consider printed brochures or flyers, which are somewhat expensive and effective tools or you can post signs at visible locations. Contact local media resources: newspapers, radio stations, and public access television stations. Also, consider personally contacting people, municipal officials as well as state and federal legislators.
 6. **Food:** Offering food and refreshments, or a meal sponsored by an area organization is always a good idea.

Outcomes:

The very first outcome is the responsibility of the speaker. The second is the product of the small group discussions. After the keynote speakers, the large group should be broken down into small discussion groups of no more than 10 people. Participants can be randomly assigned to different groups to help the discussion flow more freely. Each of the small groups should have a facilitator, who must make sure that everyone in the group has a chance to participate and that the group develops a list of issues.

The facilitator's first task is to ask the group members to list the issues in their community. This can be done as a brainstorm or by asking each group member to write down his or her issues on a piece of paper. Comments should be recorded on flip charts so that the entire group can see. Afterwards, every participant should "vote" for the top five issues by placing a colored sticker next to the most important comments recorded on the flip charts.

Participants should be reminded during this process that they are not here to solve problems, but to identify and take stock of all the issues and to identify the most important issues for the community's future.

KEY OUTCOMES:

- Community understands the visioning process and develops a list of key issues.
- Time: 2 to 3 hours
- Cost: Promotion, refreshments and supplies.

ESTABLISHING TASKFORCES:

A week or two after the first workshop, the Steering Committee should meet and assess what went right at the workshop and what needs to be improved. The Committee also needs to take the results of the participants' issues lists and identify similarities and differences among the lists. These lists need to be condensed or combined into four or five broad topics. These topics will serve as the basis for the taskforces.

Each taskforce needs to be assigned a temporary leader, who is usually a Steering Committee member. The leader is responsible for informally recruiting members to the taskforce and collecting the information on that particular topic.

In addition to identifying the taskforces, the Steering Committee should begin preparing for the next community workshop, which should be scheduled within two months after the first workshop.

KEY OUTCOMES:

- Community understands the visioning process and develops a list of key issues.
- Time: 2 to 3 hours
- Cost: Promotion, refreshments and supplies.

SECOND COMMUNITY WORKSHOP

Following the same organizational procedures as the first workshop, the Steering Committee should design the second workshop to get the taskforces up and running. The second workshop should offer community residents or business owners who could not or would not attend the first public workshop the opportunity to become involved.

The workshop should begin with an overview of the activities of the first workshop and the visioning process. Participants should then be directed to meet with their taskforce group. Except for the temporary taskforce leader, try not to pre-assign members to each taskforce group. Participants should be allowed to join the task force of their choosing.

Within the taskforces, several things should happen:

1. **Select a leader.** The leader may be the temporary leader or someone else.
2. **Identify who is missing from the group.** Are there individuals or organizations that have special expertise that the group needs?
3. **Select the next meeting date.** The taskforces should begin meeting regularly after the workshop.

4. **Complete a SWOT analysis of the taskforce issues** (see SWOT below).
5. **Begin identifying the resources available to address the taskforce issue.**

SWOT Analysis – Strengths, Weaknesses, Opportunities and Threats

Borrowed from business management practices, SWOT analysis is a quick way to assess an issue or topic in terms of its strengths – what is good, what are its positive attributes; weaknesses – what is wrong, what are the problems; opportunities – what can be done to improve the situation, both short and long-term; and threats – what are the external/internal threats in the future.

For communities, SWOT analysis is a useful tool to explore an issue. Below is an example of a group that used SWOT analysis to assess their downtown:

Downtown Revitalization

- ❑ Strengths: Good mix of retail and service; good traffic flow; many historic buildings
- ❑ Weaknesses: Not enough parking; lots of vacant store fronts; high property taxes
- ❑ Opportunities: Recruit a downtown manager; coordinate store hours; repave the sidewalks
- ❑ Threats: Being ignored by municipal government; shopping malls; highway bypass

KEY OUTCOMES:

- Establish active taskforces.
- Time: 2 to 3 hours
- Cost: Promotion, refreshments and supplies.

KEEPING ON TRACK

A week or so after the second workshop, the Steering Committee should meet and again assess what went right at the workshop and what needs to be improved. The second task for the Committee is to make sure the taskforces are meeting regularly. The leader of each taskforce should be asked to give a brief report on their findings and activities to date.

The Steering Committee should also continue to grow. New members should be asked to join and to take a leadership role. The Committee should also begin informally surveying other groups to determine what their mission is and how they can work together.

Finally, the Steering Committee should begin planning for the third workshop. This workshop should be scheduled on later than two months after the second workshop.

KEY OUTCOMES:

- Keeping the taskforces active, planning for the next workshop.
- Time: 2 to 3 months
- Cost: None.

THIRD COMMUNITY WORKSHOP

Following the same organizational procedures as the first workshop, the Steering Committee should design the third workshop to allow for the actual writing of the community's vision statement. This workshop should also give individuals who could not attend the first two workshops, the opportunity to become involved.

After the welcoming remarks and a review of the activities to date, participants should be randomly assigned to small groups of no more than 10 people. Each small group should have a pre-assigned facilitator. The role of this facilitator is to record the answers to the questions below on a flip chart and to keep the session focused.

- What features (physical, social, culture) do residents use to identify their community?
- What are the community's principle values?
- What defines a "good" quality of life in the community?
- What are the community's opportunities?
- What things in the community should be preserved? What things should be changed?
- What should the community physically look like in the future?
- How fast should changes occur?

By now, most workshop participants should have a good understanding of their community, including its problems and opportunities. The facilitator should encourage an open discussion of the questions above and should discourage participants from focusing on "how" issues. The facilitator should also stay clear of any discussion about funding and project feasibility since these matters stifle creativity. The "how" questions are typically addressed during the planning process.

The timeframe for answering these questions can vary from community to community. Typically, most places incorporate a five to ten-year timeframe.

After a short break, the small groups should meet again to begin writing a vision statement. Using the responses from the first session, participants should be asked to write a short one to two paragraph statement about their community and its future. Elements of this statement may include a list of community values; a list of future opportunities; and a description of what the community will look and feel like in the future.

Each small group should develop its own statement. Because the statements will ultimately be combined, the groups should not get overly concerned about spelling or grammar. At this point, it's important to flesh out ideas and dreams about the community's future.

KEY OUTCOMES:

- Develop small group vision statements.
- Time: 2 to 3 hours
- Cost: Promotion, refreshments and supplies.

DRAFTING THE VISION STATEMENTS

Another week after the third workshop, the Steering Committee should meet and assess what went right at the workshop and what needs to be improved. The key assignment for the Steering Committee is to take the small group vision statements and combine them into a single statement.

This task is not as daunting as it may seem. In most instances, the small groups will come up with very similar statements. Oftentimes, the only tricky part is wordsmithing the final statement.

Once the statement is completed, it should be test driven. The small group facilitators, selected community leaders, and others active in the visioning process should have an opportunity to make sure the statement captures what participants actually said at the workshop. Any modifications should be done at this time.

The Steering Committee should also make sure that the taskforces are meeting regularly and should ask taskforce leaders to provide brief updates on their activities. Plans for the final community workshop should also be underway.

KEY OUTCOMES:

- Draft the vision statement, keep taskforces active, plan for the next workshop.
- Time: 2 to 3 months
- Cost: None.

FOURTH COMMUNITY WORKSHOP/CELEBRATION

The fourth workshop should be a community celebration. It could be a picnic or street festival, or even a part of some other type of community-wide event. The only "work" that should take place at this workshop is to make sure that everyone is having fun.

Ideally, the celebration should be held no later than three months after the third workshop and should mark the official unveiling of the community's vision statement.

REMEMBER: Invite members of the media to attend the event so that the activities of

the day and vision statement can be introduced to a wider audience. It's a good idea to print and mount the vision statement on large poster board and to have extra copies of the statement printed to pass out to the media and the audience.

KEY OUTCOMES:

- Unveil the vision statement to the public and celebrate.
- Time: Varies.
- Cost: Varies.

MARKETING AND MAKING THE VISION A REALITY

After the community celebration, the Steering Committee should meet and begin developing a marketing strategy for the vision statement and, more importantly, a strategic action plan. Both of these activities can occur at the same time.

The marketing strategy should be designed to get the word out about the vision statement. More specifically, it should explain what the vision statement is, how it was created, and how it is to be used. The strategy should include features that will help it recruit volunteers for developing the strategic action plan.

REMEMBER: The objective of your marketing strategy is to get as many groups and organizations as possible to support and use the statement, and to get as many people as possible involved in the planning and implementation process.

The strategic action plan is the detailed strategy on how the vision statement will be implemented. The action plan should include any resources needed to implement the plan. This is where the work of the taskforces comes into play. Although the plan is a community-wide activity, it may be necessary to get outside technical advice.

In developing the strategic action plan, the Steering Committee should first break the vision statement down into its basic components, and explain the intent behind each component. Next, it should describe the individual goals and objectives of the taskforces.

With this information and input from different community groups, the Steering Committee can also identify and prioritize specific projects. Simple low cost projects should be tackled first and larger, more expensive projects should be placed near the end of the vision timeline.

After the goals and projects are identified, the Committee should examine funding resources. Experience has shown that communities with an identified vision and action plan are more successful in securing funds than those communities that want money for a project here and there without any knowledge of how these projects will ultimately fit together.

The role of the Steering Committee and taskforces is to make sure the projects are completed and that groups are coordinated.

KEY OUTCOMES:

- Secure community support for the vision statement and develop a strategic action plan to implement the vision statement.
- Time: Ongoing.
- Cost: Varies.

ANNUAL PROGRESS REPORT

As the strategic action plan is being implemented, it is a good idea to let residents and others know how the plan is progressing. Develop an annual progress report and make it available to the public. Consider passing out copies of the report during town meetings, including it in the town's annual report, and sending a copy to the local newspaper.

Generally, the report should include a copy of the vision statement and a summary of the strategic action plan. It should also review any accomplishments to date and recognize every individual or organization that made meaningful contributions during the year. Additionally it may include any before-and-after pictures and should outline coming year's activities.

KEY OUTCOMES:

- Report implementation progress to the community.
- Time: Every year.
- Cost: Varies.